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Washington, D.C. 20250

WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR 37-83

WASHINGTON, Sept. 14--The ~~NEW~~ ^{1 '83} Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

OILSEEDS AND PRODUCTS

PROCUREMENT SECTION
CURRENT SERIAL RECEIVED

Given the tight world supply and demand situation for soybeans and products, forecasts of FRANCE's imports and utilization of soybeans will drop by about a tenth, according to the U.S. agricultural counselor in Paris. Adding to the soybean short supply situation is the high dollar price of soybeans, and the continuing slide in the value of the franc compared with the U.S. dollar. French consumption of soybean meal is now expected to remain, at best, at the 1982 level in the current year, and will drop by about 15 percent in 1984.

According to the U.S. agricultural counselor in Copenhagen, price sensitive feed compounders in DENMARK are adjusting rations to use 5-10 percent less soybean meal. If prices stay at very high levels over the next year, substitution could reduce utilization by up to 20 percent. Denmark's total oilmeal imports for 1982 were close to 2 million tons, including 1.1 million tons of soybean meal.

According to the U.S. agricultural attache in Islamabad, PAKISTAN's palm oil imports in the current year and in 1983/84 are expected to rise sharply compared to previous estimates with the shift in use away from soybean oil, particularly U.S. soybean oil, because of increased prices. Soybean oil imports are now forecast at 185,000 and 180,000 tons in 1982/83 and 1983/84, respectively; palm oil imports are now forecast at 335,000 and 370,000 tons, respectively.

DAIRY, LIVESTOCK AND POULTRY

Estimates for WORLD dairy production originally scheduled for release in today's issue of the Weekly Roundup of World Production and Trade will be released instead in the September 21 issue, WR 38-83.

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EUROPEAN COMMUNITY dairy stocks continue to increase. Butter stocks on August 25 were 799,600 tons and those of nonfat dry milk (NFDM) reached 1,048,400. By comparison, U.S. butter and NFDM stocks as of August 26 were 210,200 tons and 617,600 tons, respectively.

The EC's program to encourage feed use of NFDM was extended to permit product entered before January 1, 1983, to be eligible. Previously only product entered before August 1, 1982, was eligible. However, this is not expected to make significant inroads into the surplus problem. Therefore, export subsidies were also increased in June in hopes of moving more into foreign markets. (Butter up 82 ECU's to the equivalent of \$1,406 per ton and NFDM up 12 ECU's to \$531 per ton.) As a result, competition for markets will be intense and international prices will continue to soften until these extremely high stock levels are reduced.

Total meat production in SELECTED countries is estimated to be up just over 1 percent in 1983 due principally to a boost in pork production. Higher feed prices and continued slow demand growth are likely to keep meat production growth in 1984 well below the 1983 rate. Current conditions indicate that during 1984 beef, pork and mutton production is likely to show little change while poultry meat production gains 2-3 percent. Data are as follows in million tons:

	Meat Production		
	1982	1983	1984
Beef and veal	40.0	39.9	39.5
Pork	36.4	37.4	37.8
Sheep and goat meat	4.5	4.5	4.5
Total red meat	80.9	81.8	81.8
Poultry	22.2	22.5	23.2
Grand total	103.1	104.3	105.0

At the beginning of 1984, cattle numbers in selected countries are expected to be up about 2.5 million head largely because of herd growth in the Soviet Union and Argentina. If current favorable weather conditions continue, growth in both inventory and beef production in the Soviet Union is expected to continue in 1984. If pasture conditions remain favorable, reduced slaughter levels in Argentina are expected to continue into 1984. Australian cattle numbers are expected to be down this year because of drought-induced slaughter early in 1983. In New Zealand, beef cow numbers continue to decline due both to drought and expanding sheep production.

Canada's January 1983 beef cow numbers, at their lowest level since 1971, are expected to continue to decline, resulting in lower beef production in 1984. Both 1984 numbers and production in the United States may decline as producers react to low beef prices and higher feed prices. South African herd reductions are expected to continue because of drought. In the European Community (EC), slight growth in inventory levels is expected, while beef production remains at the 1983 level. East European inventory levels are expected to drop slightly this year, while beef production for 1984 is expected to remain at depressed 1983 levels.

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Cattle Numbers and Beef Production

	Beginning Cattle Inventory			Beef and Veal Production		
	1982	1983	1984	1982	1983	1984
	-----Million Head-----			--Million Metric Tons---		
Canada	12.1	11.6	11.3	1.03	1.04	1.02
United States	115.6	115.2	114.2	10.43	10.71	10.30
EC-10	77.9	78.9	79.2	6.60	6.78	6.78
Eastern Europe	37.8	37.2	37.1	2.48	2.31	2.33
Soviet Union	115.9	117.1	119.0	6.60	6.80	7.00
Argentina	57.9	58.9	60.5	2.58	2.30	2.30
Uruguay	10.9	10.3	9.4	0.38	0.42	0.38
Australia	24.6	22.5	22.0	1.68	1.39	1.31
New Zealand	8.0	7.9	7.6	0.52	0.54	0.48
Total (49 countries)	937.5	935.9	938.4	40.03	39.86	39.53

Hog numbers are expected to be up about 4 million head at the start of 1984 largely because of Soviet expansion. Based on a favorable feed supply situation, Soviet pork production is projected to reach record levels during 1984. Abundant pork supplies in the North American market may cause 1984 Canadian hog numbers to be down and pork production to remain at the 1983 level. Mexican hog numbers are expected to fall this year due to the depressed economy. EC hog numbers and pork production are expected to show little change until the feed/pork price relationship improves. In Eastern Europe, some recovery in inventories is foreseen this year, bringing a slight rise in 1984 production. Most of the regional change is in the German Democratic Republic, where more adequate feed supplies are facilitating recovery of the pork industry.

Hog Numbers and Pork Production

	Beginning Hog Inventory			Pork Production		
	1982	1983	1984	1982	1983	1984
	-----Million Head-----			---Million Tons---		
United States	58.7	53.9	53.2	6.45	6.85	6.74
Canada	10.0	9.9	9.8	0.83	0.85	0.85
Mexico	16.5	16.0	14.0	1.20	1.08	1.07
EC-10	78.3	79.2	79.7	9.41	9.52	9.54
Eastern Europe	72.3	69.8	70.6	6.49	6.36	6.43
Japan	10.0	10.3	10.4	1.43	1.45	1.48
Soviet Union	73.3	76.5	79.5	5.10	5.60	5.90
Total (49 countries)	405.1	405.1	409.0	36.37	37.38	37.79

As a result of the drought in Australia, sheep numbers declined in 1982 and early 1983. With the return of more normal rainfall, Australian sheep numbers should start to recover. An unusually good lamb crop in New Zealand caused 1983 meat production to increase. With a normal lamb crop, 1984 meat production will return to the 1982 level. Sheep numbers in the Soviet Union are expected to show a marginal increase at the beginning of 1984. However, meat production may not increase as efforts are made to further enlarge the flock.

Sheep Numbers and Meat Production

	Beginning Sheep Inventory			Sheep and Goat Meat Production		
	1982	1983	1984	1982	1983	1984
	-----Million Head-----			-----1,000 Tons-----		
USSR	142.4	142.1	142.5	800	800	800
Australia	138.0	134.0	135.0	554	479	532
New Zealand	69.9	70.3	70.4	619	652	620
Total (31 countries)	668.7	664.6	667.5	4,482	4,510	4,520

Poultry meat production in 36 SELECTED countries in 1983 is currently estimated at 22.5 million tons, 1.5 percent above 1982. Slow exports have reduced prospects for profitable production in the EC and Brazil in 1983; however, production in these countries may expand slightly in 1984 if import demand strengthens as expected. Soft domestic demand and no growth in exports will keep Brazil's 1983 production at the 1982 level. The same factors are expected to cause a 3-4 percent decline in 1983 EC broiler production. Producers in Spain cut back 1983 broiler production in an attempt to balance supply with demand.

Current conditions indicate higher feed prices will keep 1984 growth in U.S. broiler production at the reduced level of 1983. Short feed supplies likely will keep 1983 Mexican poultry meat production 10 percent below the 1982 peak.

In Eastern Europe, Poland's grain supplies are not being allocated to the poultry industry on a priority basis and, as a result, 1983 and 1984 poultry meat production will continue at less than half the 1981 level. It appears the Soviet poultry industry will grow 7-9 percent annually in both 1983 and 1984. Feed supplies are more readily available than during the previous three years.

Poultry meat production in Japan is expected to increase over 5 percent in 1983 as feed prices have been sufficiently low to create favorable profit margins.

Egg production during 1983 in 36 SELECTED countries is up by 0.7 percent and a similar increase is likely in 1984. Production increases by the USSR, due to more adequate feed supplies, and Japan, with lower feed prices during the first half of 1983, account for most of the 1983 increase. The United States and various West European countries are reducing egg production in an attempt to restore more favorable producer prices. Data are as follows:

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Poultry Meat and Egg Production
(1,000 Metric Tons and Billion Units)

	Total Poultry Meat			Eggs		
	1982	1983	1984	1982	1983	1984
	---1,000 Tons---			---Billion Units---		
United States	7,044	7,243	7,376	69.6	68.1	67.5
Mexico	564	506	516	10.0	9.8	9.9
Brazil	1,591	1,602	1,652	10.2	10.3	10.5
EC-10	4,371	4,301	4,341	72.2	72.1	71.2
Spain	853	820	845	12.3	12.4	12.2
USSR	2,400	2,600	2,800	72.1	74.2	76.5
Japan	1,209	1,277	1,307	34.3	34.9	35.0
Total (36 countries)	22,196	22,527	23,167	344.8	347.1	349.1

Broiler and Turkey Meat Production
(1,000 Tons)

	Broiler			Turkey Meat		
	1982	1983	1984	1982	1983	1984
United States	5,523	5,679	5,836	1,144	1,212	1,190
Mexico	455	400	410	33	30	30
Brazil	1,500	1,500	1,610	1/	1/	1/
EC-10	3,018	2,909	2,952	687	715	720
Spain	783	750	775	19	20	21
USSR	675	725	775	47	49	50
Japan	1,080	1,150	1,180	1/	1/	1/
Total (36 countries)	15,200	15,309	15,831	2,116	2,218	2,209

1/ Insignificant.

COTTON AND FIBERS

ARGENTINA's 1983/84 cotton crop is forecast at 780,000 bales, 48 percent above last year's flood-damaged crop of 528,000 bales, according to the U.S. agricultural attache in Buenos Aires. Increased output is attributed to a return to more normal weather conditions, an anticipated 44-percent increase in cotton plantings and more attractive support prices. Farmers are expected to increase cotton plantings at the expense of sunflower and sorghum. Also, more fallow land will likely be brought into production provided sufficient quantities of seed are available.

BRAZIL's 1983/84 cotton crop is forecast at 2,750,000 bales, down 258,000 bales from last year's revised estimate of 3,008,000 bales, according to the U.S. agricultural officer in Sao Paulo. Lower output is attributed to an expected 10 to 15 percent area reduction in two of Brazil's largest cotton producing states, Sao Paulo and Parana.

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In Sao Paulo, the government is encouraging farmers to switch from cotton to other crops, such as corn, rice and dry beans to prevent the spread of pink boll worm infestation. In Parana, lower cotton plantings are anticipated due to favorable price prospects for soybeans and other food crops, as well as to the poor yield of last season's rain-damaged cotton crop.

ISRAEL's 1983/84 cotton crop is expected to total 365,000 bales, down 33,000 bales from last year's revised estimate of 398,000 bales, according to the U.S. agricultural attache in Ankara, Turkey. A cool, wet spring with excessive rain in some of the important cotton regions in the north delayed some planting into mid-May. As of mid-August, the cotton crop's development was reported to be about three weeks late. Harvesting, which has already commenced in some areas, will continue well into November.

PAKISTAN is continuing to press for more favorable cotton yarn import treatment from JAPAN despite efforts by the Japanese Spinners Association to limit yarn imports. Pakistan hopes to correct the overwhelming trade imbalance between the two nations, while Japan seeks to limit cotton yarn imports as bankruptcies in the textile industry reach record levels. Overall, economic relations between the two nations have improved and although Japanese imports from Pakistan are not expected to rise dramatically, the continued increase of cotton yarn imports into Japan may pose difficulties not only for Japanese spinners, but also for U.S. cotton exports to Japan.

PAKISTAN has decided to revise its cotton yarn export rebate policy. The 4.5-percent yarn rebate has been abolished, while cloth rebates were reduced from 10 to 5 percent. The decision follows a great deal of criticism levied by importing nations and competitors on Pakistani yarn export policies.

COFFEE, TEA AND COCOA

WORLD green coffee production for 1983/84 is estimated at 93.6 million bags (60 kilograms each), down about 1.5 percent from the first estimate but still more than 12 million bags above the 1982/83 output of 81.5 million. Over half of the decrease from the first estimate resulted from a 750,000-bag reduction in the Brazilian crop to 30.75 million bags due to heavy rains during May and June. However, production remains 13 million bags higher than last year's reduced output. Crop quality reportedly has been reduced significantly although the quality is expected to improve with later harvested beans. Production in Colombia remains unchanged at 13 million bags. Coffee production in Ecuador also has been reduced as a result of continued rains associated with the "El Nino" current and its effects. Output is now estimated at 1.65 million bags, down over 15 percent from the first estimate and also down 10 percent from last year's 1.84 million bags.

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Coffee production in both the Dominican Republic and El Salvador for 1983/84 is reduced about 200,000 bags each from earlier estimates. Production in the Dominican Republic is estimated at 800,000 bags, a 27-percent drop from a year ago as a result of less favorable weather and the biennial cycle of production. Late and sporadic rains in El Salvador are expected to result in a 1983/84 crop of 2.6 million bags, a decline of 9 percent from a year ago.

Drought in the Central African Republic is expected to reduce the 1983/84 crop to 120,000 bags, down 60 percent from last year's production of 308,000 bags. Production in the Ivory Coast is forecast at 3.65 million bags, down from last year's level of 3.9 million due to aging trees and hot, dry weather during the flowering stage. Drought in the Philippines is also expected to reduce 1983/84 production to 912,000 bags, down 5 percent from the 1982/83 level of 960,000 bags.

Production by regions and for selected countries for 1982/83 and 1983/84 is reported as follows in 1,000 bags:

Region/Country	1982/83	1983/84
North and Central America and Caribbean:		
Costa Rica	2,300	2,070
Dominican Republic	1,100	800
El Salvador	2,855	2,600
Guatemala	2,420	2,625
Honduras	1,456	1,350
Mexico	4,100	4,000
Nicaragua	1,075	1,100
Others	1,523	1,331
Total	16,829	15,876
South America:		
Brazil	17,750	30,750
Colombia	13,300	13,000
Ecuador	1,835	1,650
Peru	1,100	1,200
Others	1,338	1,615
Total	35,323	48,215
Africa:		
Cameroon	1,867	1,900
Ethiopia	3,350	3,350
Ivory Coast	3,900	3,650
Kenya	1,460	1,530
Uganda	3,200	3,100
Zaire	1,450	1,400
Others	4,468	4,687
Total	19,695	19,617
Asia and Oceania:		
India	2,100	2,450
Indonesia	5,250	5,000
Philippines	960	912
Papua-New Guinea	700	920
Others	627	583
Total	9,637	9,865
World Total	81,484	93,573

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Tea production in SELECTED countries for 1983 is estimated at 1.96 million tons, up 3.7 percent from the revised 1.89 million tons produced in 1982. India remains the largest producer with 568,000 tons, up marginally from the 566,000 tons produced in 1982. Drought has lowered output in southern India, but this is being offset by improved production in the northeast. Production in China is expected to continue to increase, with government procurement reaching 425,000 tons in 1983, up another 7 percent from the 1982 level and nearly 70 percent more than the 1977 production of 252,000 tons. Production in the Soviet Union is expected to increase due to more favorable weather, with 1983 output estimated at 145,000 tons. Japan remains a stable producer with 100,000 tons for 1983. Drought and internal strife are affecting Sri Lanka's 1983 output, now expected to total 170,000 tons, down 9.5 percent from the 1982 levels and 19 percent below the 1981 output.

In Africa, production in Kenya is up nearly 22 percent to an estimated 118,000 tons. The increase is due primarily to more favorable weather conditions and higher yields of newer plantings. Production for Malawi and Tanzania is expected to be slightly higher at 39,000 tons and 17,500 tons, respectively. Due to drought in southern Africa, production in Mozambique and Zimbabwe is estimated at 20,000 tons and 10,000 tons, respectively, lower than during the previous year. Only minor changes are anticipated for tea production in South America.

FRUITS AND NUTS

Preliminary estimates indicate NORTHERN HEMISPHERE pear production will reach a record 4.3 million tons, 9 percent above the 1982 level. Record crops are forecast for Spain and Greece. Excessively high temperatures, coupled with a shortage of rain during the crucial spring growing period, adversely affected pear crops in some countries. However, as in the case of West Germany and Yugoslavia, output is merely expected to return to more normal levels following record harvests last season. Although sizing has been a problem in some European orchards, fruit quality is reportedly above average on both continents.

Pears: Production in Selected countries 1/
(1,000 tons)

Region/country	1978	1979	1980	1981	1982	1983 2/
North America:						
Canada	35	33	39	32	32	32
Mexico	46	48	46	31	41	42
United States	656	775	814	814	730	747
Region total	737	856	899	877	803	821

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European Community:

Belgium/Luxembourg	66	63	75	58	94	97
Denmark	6	4	6	3		4
France	349	433	413	428	427	422
Germany, West	374	367	394	276	534	373
Greece	81	104	111	115	99	134
Italy	1,212	1,062	1,342	1,220	1,134	1,454
Netherlands	110	120	105	90	105	120
United Kingdom	26	60	44	49	40	56
Region total	2,224	2,215	2,488	2,242	2,436	2,660
Other Europe:						
Austria	45	46	42	32	55	45
Norway	11	5	6	10	8	8
Spain	437	480	418	525	449	611
Sweden	5	8	5	6	5	4
Switzerland	20	18	19	15	22	20
Yugoslavia	92	95	115	137	177	150
Region total	610	652	605	725	716	838
Grand total	3,571	3,723	3,992	3,844	3,955	4,319

1/ May include cider varieties not reported separately by some countries.

2/ Preliminary.

Commercial apple production in the NORTHERN HEMISPHERE during the 1983 season is projected to fall 14 percent short of the record volume harvested in 1982. Fairly normal crops are expected in Canada and Mexico despite persistently dry weather. Some sizing problems have been reported. The U.S. crop, if finalized at 3.8 million tons, will be the second largest on record. Current forecasts indicate a substantial reduction in Europe's 1983 apple output. Most of the shortfall will occur in the EC, where production is expected to be down one-fourth from the record 1982 level, and 10 percent below the 1980 harvest that forecasters have been using as a yardstick for a "normal crop". As in North America, hot, dry weather not only reduced yields, but caused an above normal incidence of fruit drop and sizing problems.

Apples: Production in Selected Countries 1/
(1,000 tons)

Region/country	1978	1979	1980	1981	1982	1983 2/
North America:						
Canada	452	435	553	417	458	453
Mexico	313	338	282	280	343	324
United States	3,446	3,694	4,005	3,517	3,679	3,802
Region total	4,211	4,467	4,840	4,214	4,480	4,579

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European Community:

Belgium/Luxembourg	273	322	330	134	263	219
Denmark	81	87	63	43	59	60
France	1,768	1,769	1,802	1,468	1,973	1,518
Germany, West	1,783	1,951	1,880	773	2,637	1,505
Greece	174	280	262	300	254	336
Italy	1,874	2,023	1,966	1,773	2,594	2,072
Netherlands	510	450	450	260	440	340
United Kingdom	342	334	321	227	341	308
Region total	6,805	7,216	7,074	4,978	8,561	6,358
Other Europe:						
Austria	203	248	240	186	316	244
Norway	59	36	41	54	44	51
Spain	1,015	1,097	859	1,007	853	1,061
Sweden	34	51	33	29	43	36
Switzerland	130	130	120	83	140	101
Yugoslavia	381	428	483	508	746	620
Region total	1,822	1,990	1,776	1,867	2,142	2,113
Grand total	12,838	13,673	13,690	11,059	15,183	13,050

1/ May include cider varieties not reported separately by some countries.

2/ Preliminary.

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Selected International Prices

Item	: Sept. 13, 1983		: Change from		: A year ago
	:		: previous week		
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT	\$ per MT	
Wheat:					
Canadian No. 1 CWRS-13.5%.	213.00	5.80	+2.00	194.50	
U.S. No. 2 DNS/NS: 14%...	188.50	5.13	+1.50	175.00	
U.S. No. 2 DHW/HW: 13.5%..	N.Q.	--	--	N.Q.	
U.S. No. 2 S.R.W.....14/	170.00	4.63	.50	142.00	
U.S. No. 3 H.A.D.....13/	210.00	5.72	-0-	166.00	
Canadian No. 1 A: Durum..	229.00	6.23	+9.00	181.00	
Feed grains:					
U.S. No. 3 Yellow Corn....	165.75	4.21	+.75	106.00	
U.S. No. 2 Sorghum 2/.....	N.Q.	--	--	N.Q.	
Feed Barley 3/.....	N.Q.	--	--	N.Q.	
Soybeans and meal:					
U.S. No. 2 Yellow.....	364.00	9.90	+14.50	219.75	
Brazil 47/48% SoyaPellets 4/	304.00	--	+7.00	208.00	
U.S. 44% Soybean Meal.....	288.50	--	+5.50	195.00	
U.S. FARM PRICES 5/					
Wheat.....	131.18	3.57	--	125.66	
Barley.....	94.62	2.06	+4.14	63.84	
Corn.....	133.46	3.39	+2.76	88.18	
Sorghum.....	115.08	5.22 6/	-1.32	84.00	
Broilers 7/.....	1292.12	--	-4.41	N.A.	
EC IMPORT LEVIES					
Wheat 8/.....	65.80	1.79	+4.60	105.65	
Barley.....	43.20	.94	-2.65	97.40	
Corn.....	33.85	.86	-1.65	106.75	
Sorghum.....	44.45	1.13	-.65	95.80	
Broilers 9/.....	269.00	--	+2.00*	285.00	
EC INTERVENTION PRICES 11/					
Common wheat(feed quality)	161.30	4.39	+.80	169.75	
Bread wheat (min. quality)	177.75	4.84	+.95	187.80	
Barley and all					
other feed grains.....	161.30	--	+.80	169.75	
Broilers 11/.....	1058.00	--	-0-	N.Q.	
EC EXPORT RESTITUTIONS (subsidies)					
Wheat 12/.....	32.25	.88	+3.20	69.10	
Wheat flour.....	N.Q.	N.Q.	N.Q.	N.Q.	
Barley.....	11.90	.26	--	N.A.	
Broilers 9/.....	193.00	--	+1.00*	191.00	
Sugar, refined	N.Q.	N.Q.	N.Q.	N.Q.	

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine Granifero sorghum. 3/ Optional delivery: Canadian feed barley. 4/ Optional delivery: Argentine. 5/ Based on selected major markets and adjusted to reflect farm prices more closely. 6/ Hundredweight (CWT). 7/ Twelve-city average, wholesale weighted average. 8/ Durum has a special levy. 9/ EC category--70 percent whole chicken. 10/ Reflects exchange rate change and not level set by EC. 11/ F.o.b. price for R.T.C. broilers at West German border. 12/ Corrective amount Aug. 3, Sept. -3, Oct. -5, Nov. -8, and Dec. -10. 13/ Sept. 15-Oct. 15 delivery. 14/ Oct. delivery. N.Q.=Not quoted. N.A.=None authorized. Note: Basis September delivery. *Reflects currency fluctuation and not change in level set by EC.

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